Collaboration Meeting Leadership Toolkit

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Overview

This toolkit was collaboratively created and completed by a workgroup consisting of leadership, policy and operations analysts, case managers and eligibility workers from:

- Area Agency on Aging (AAA)
- Community Developmental Disabilities Programs (CDDP)
- Office of Developmental Disability Services (ODDS)
- Oregon Eligibility Partnership (OEP)
- Support Services Brokerages

The group's goal was to address communication challenges that led to fragmented coordination, delays in service delivery, and missed opportunities for collaborative problem-solving. Together, they identified solutions to improve communication and coordination between I/DD services and medical eligibility programs, and created tools to support consistent and timely coordination:

- The ODDS and OEP Cross-Program Terminology Guide
- The Point of Contact Toolkit
- The Collaboration Meeting Leadership Toolkit

By using these tools, teams can improve communication and collaboration across programs, ensuring accurate outcomes and supportive service delivery for individuals with intellectual or developmental disabilities who are applying for or receiving long-term care services.

Purpose of the toolkit

The Collaboration Meeting Leadership Toolkit provides guidance for local leaders representing:

- Oregon Eligibility Partnership (OEP)
- Area Agency on Aging (AAA)
- Support Services Brokerages
- Community Developmental Disabilities Programs (CDDP)

It was designed to provide a statewide framework to establish and sustain local meetings that can be tailored to each county or district. It provides guidance on meeting frequency, agendas, roles, communication practices, and sustainability strategies to ensure long-term effectiveness. Its purpose is to support timely Medicaid eligibility for individuals receiving I/DD services by:

- Providing tools for holding local collaboration meetings
- Promoting shared communication protocols
- Strengthening cross-program coordination

Leadership toolkit

Recognizing variations in long-term care experiences and agency presence across the state, this guide provides a framework for establishing a local collaboration meeting for OEP/AAA and ODDS CME offices. Below are expectations and recommendations for successful implementation.

Meeting guidance and recommendations

Attendees

Each local area should determine the structure for Collaboration Meetings that will work best in their geographic region, making sure to include representatives from each of the following partner agencies:

- Core attendees and why they matter:
    - **OEP/AAA supervisors –** They support financial eligibility staff and local process.
        - If OEP and AAA are both active in an area, both agencies should attend.
    - **CDDP supervisors –** They support I/DD Long Term Care services staff for children and adults with in-home services and out-of-home placements.
    - **Brokerage supervisors –** They support I/DD Long Term Care services staff for adults with in-home services.
- Situational guests and why they matter:
    - **OEP/AAA Financial Eligibility workers –** They determine financial eligibility for medical with long-term care, which can impact an individual's access to I/DD services. They also determine eligibility for other essential programs.
    - **CDDP Services Coordinators –** They coordinate I/DD Long Term Care services for children and adults with in-home services and out-of-home placements.
    - **Brokerage Personal Agents –** They coordinate I/DD Long Term Care services for adults with in-home services.

- **OEP Eligibility Coordination Unit (ECU) –** A small team of eligibility workers who are involved in children's Medicaid eligibility; can be included for case coordination.
- **Children's Intensive In-Home Services (CIIS) Service Coordinators –** Case coordination for children who are enrolled in medically fragile, medically intensive, and DD-behavioral programs. CIIS is an ODDS specialized unit; these cases are not managed by CMEs.
- **AAA/APD Case Managers –** The equivalent of I/DD services case managers; they can be included for case coordination if an individual with I/DD is in a nursing facility or is interested in receiving long-term care services under the APD waiver.
- **Partners –** Staff from housing, behavioral health, Child Welfare, or crisis services can be included for case coordination when relevant.

A healthy meeting typically includes a balanced mix of decision-makers and contributors, aligned with the stated purpose of the meeting.

Meeting checklist

1. Identify who your local partners are and who should attend the meetings:
   - Refer to the ZIP Matrix for information about program and geographic area cross-over.
   - Initial contact should be made with the local OEP/AAA Program Manager(s) noted on the ZIP Matrix and with the CDDP and Brokerage Program Manager(s) using the CDDP Directory and Brokerage Directory contacts.
     - If you are having difficulties determining the CDDP or Brokerage Program Manager(s) reach out to odds.onequestions@odhsoha.oregon.gov.
2. Decide meeting format and location:

- Virtual – if virtual makes the most sense for your area be sure to choose a platform that all partners can access.
- In-person – if in-person is preferred, determine if the location will rotate or be in one location for each meeting.

3. Decide meeting cadence:
   - Quarterly meetings are the minimum standard.
   - Pilot areas reported more success with a monthly cadence.
   - Recommend minimum 1 hour for monthly and 2 hours for quarterly.
   - Adjust as needs evolve.
4. Decide who will facilitate (send meeting invite, schedule a meeting space, gather agenda items, take notes, etc.):
   - Will it be a standing or rotating facilitator?
     - Consider having a "point person" for OEP/AAA and CMEs who will gather agenda items from staff in their program area(s) and bring those items to the meeting.
       - Points could have a "prep" meeting or email to finalize the agenda.
5. Build your agenda:
   - If you are not sure where to start refer to the meeting agenda template.
   - Create subsequent agendas to support local needs.
   - Send to meeting attendees ahead of time.

Additional recommendations

- Practice good meeting habits:
  - For effective collaboration to occur, there needs to be representation and participation from all core attendees.
  - Review privacy and case discussion expectations (ODHS/OHA 100-004, ODHS/OHA 100-001)

        - Use and disclose only the minimum necessary information to accomplish the business purpose
        - Avoid unnecessary collection of personal identifying information (PII)
        - Be mindful of sharing PII when recording.
            - Pause the recording and transcription if PII is required to be shared in order to support the conversation.
    - At the end of the meeting assign facilitator and note taker for subsequent meeting, if rotating.
    - Note taker should share or post meeting minutes for those who were not able to attend, and any follow up or action items that were discussed.
        - Note taker should review notes and remove any PII prior to sharing.
    - Built-in meeting evaluation checkpoints (e.g., every 6 months) – to determine what's working/not working.

Meeting agenda template

This kit includes a recommended agenda template. Adjustments can be made to fit each local area's cadence and needs.

Recommended standing agenda topics:

- Welcome and informal networking
    - At initial meeting share the I/DD Services and Medical Eligibility Basics PowerPoints to help foster a high-level understanding of each program's eligibility process.
- Celebrating successes and shared wins
- Program updates from each program partner
- Emerging trends
- Point of Contact email inbox check-in.

  - How's it going? - Including any point of contact emails that have not been addressed timely.
- Open discussion/problem-solving
  - Case staffing
    - Some pilot areas found success holding separate case staffing meetings and not including it in the "primary" meeting.
    - No Personally Identifiable Information (PII) to be included in notes.
    - Meetings are high-value when they enable decisions, alignment, or problem-solving that cannot be accomplished outside of the meeting.
- Action items and next steps
  - Review open action items.
    - Accountability health is strong when ownership, deadlines, and follow-up are consistent and visible.
  - Confirm date, time, and location of next meeting
  - Confirm facilitator(s) and note taker(s) for next meeting

Strong agenda health is indicated by clear objectives, advance communication, and alignment with participant priorities. For example: decision-making or problem-solving.

Link to Meeting agenda template

Executive Leadership Updates

Local leadership will send updates to OEP and ODDS executive leadership on a quarterly schedule, or more often as needed. Email recipients are:

- ODDS Policy and Program Manager- chelas.a.kronenberg@odhs.oregon.gov
- OEP Eligibility Operations Administrator- audrey.brown@odhs.oregon.gov
- OEP Deputy Director- jillian.r.johnson@odhs.oregon.gov

Use the Executive Leadership Updates email template. This template is intended to help teams capture patterns and recurring themes from collaboration meetings over time. It supports shared learning and helps elevate issues and celebrate successes beyond a single meeting or team. The focus is on trends, not individual incidents. This helps executive leadership understand where coordination across programs is strengthening and where system level support is needed.

User tips:

- Look for patterns repeated across time or groups.
- Focus on themes affecting coordination, clarity, or outcomes, including knowledge or training gaps.
- Be specific about impact and needed support.
- Risks or barriers emerging with collaboration, business processes, or ONE system function.
- Include celebrations and processes that are working well.

Continuous improvement and maintenance

If your area chooses, you can use the Continuous Improvement and Maintenance tools to best monitor and support your collaboration meetings, which includes a post-meeting feedback form and meeting effectiveness assessment tool (attendance, engagement, usefulness).

See Continuous improvement tools

FAQs

- Is it required to create and maintain a Collaboration Meeting?
    - Yes! This Toolkit includes best practices for engaging in local, collaborative meetings. Tailor these ideas to suit the needs of the community and the organizations providing services in your area.

- What if my area already has a successful collaboration meeting?
    - Great! Please look through the Toolkit to ensure you've included all core attendees, to see if there are ideas to add to your meetings, or insights to share with other areas.
- Who's going to initiate the Collaboration Meeting in my local area?
    - Meeting initiation will be led by local leadership from each represented agency in your local area. If you are uncertain who your local area partners are, see the Zip matrix.

Tools and templates

Meeting agenda template

Collaboration Meeting Agenda

Date of Meeting:

Mins	Topic	Notes
	Welcome and informal networking	
	Celebrating successes and shared wins	
	Program updates from each partner: • ODDS • CMEs • OEP • AAA	

	• APD	
	Emerging trends	
	Open discussion, problem-solving, and case staffing	
	Action items and next steps	

See Meeting agenda template guidance

Executive Leadership Updates - email template

Subject Line: AAA.OEP.CME.ODDS Collaboration Meeting Updates

Body:

- Reporting period:
- Celebrations and successes:
- Risks or barriers emerging with collaboration, business processes, or ONE system function:
- Requests for Executive Leadership guidance, decisions, or support needed:

See Executive Leadership updates guidance

Continuous improvement tools

Post-meeting feedback form

It is recommended to put these questions into a survey tool, such as Microsoft Forms, for easier management of the data.

1. What program or agency area do you represent?
    a. AAA
    b. APD
    c. Brokerage
    d. CDDP
    e. OEP
    f. Other________
2. How would you rate overall participation during meetings?
   (Scale: 1 = Very low, 4 Very high)
3. Is there anything that would make this meeting more collaborative?
4. Is an agenda or a clear meeting objective communicated in advance?
    a. Yes
    b. No
5. Are agenda items relevant to all programs in attendance?
    a. Always
    b. Often
    c. Rarely
    d. Never
6. Rank the agenda items below in terms of value to you:
    a. Welcome and informal networking
    b. Celebrating successes and shared wins
    c. Program updates

    d. Emerging trends
    e. Open discussion/problem solving/case staffing
    f. Action items and next steps

7. Are action items clearly assigned to an owner?
    a. Always
    b. Often
    c. Rarely
    d. Never
8. How often are action items completed timely?
    a. Always
    b. Often
    c. Rarely
    d. Never
9. Overall, how beneficial do you find this meeting?
   (Scale: 1 = Not very beneficial, 4= Very beneficial)
10. Is time used effectively during the meeting?
    a. Very effectively
    b. Effectively
    c. Somewhat effective
    d. Ineffective
11. Any recommendations for this meeting’s continuous improvement?

These survey results can be used to evaluate the overall health, effectiveness, and value of the ongoing meeting using participant feedback, agenda quality, accountability, organization, and outcomes. Results are intended to identify strengths, gaps, and priority improvement areas.

Reviewing meeting effectiveness

Purpose: This guidance supports meeting leads and facilitators in making intentional, thoughtful adjustments to collaboration meetings as needs evolve over time. It helps teams reflect on what is working, what is not, and what should change to better support coordination and outcomes.

Rather than making reactive or ad hoc changes, this template encourages teams to use feedback, evaluation results, and observed patterns to guide decisions about meeting structure. The goal is to keep collaboration meetings clear in purpose, focused on execution, and effective as priorities, participants, and work changes.

When to use this guidance: Use this guidance when signals suggest the current meeting structure no longer fits the work. Common indicators may include:

- Repeated feedback about unclear purpose or outcomes.
- Declining attendance or uneven participation.
- Meetings running long without clear decisions or follow through.
- The same issues appearing across multiple meetings.

How to use this guidance: Before making changes, review available data such as post-meeting feedback, periodic evaluations, and recent meeting notes.

User Tips:

- Focus on clarity and outcomes.
- Limit changes to those that address specific issues.
- Test changes for a defined period, then reassess.

Template:

Step 1: Reconfirm meeting purpose

Does the meeting still meet the needs of each organization in attendance and support cross-program collaboration. If the meeting no longer fits current needs, update it before changing other elements.

Current Meeting Purpose	Revised Meeting Purpose

Step 2: Identify what is not working

Use feedback and evaluations to identify specific issues with the current structure (focus on patterns, not isolated issues). Examples may include:

- Agenda items repeat without decisions.
- The same topics resurfaced across meetings.
- Key roles attend inconsistently.
- Discussion drifts away from stated purpose.
- Action items are unclear or not completed.

Issues Identified	Evidence/Signals

Step 3: Select targeted adjustments

Choose adjustments that directly address the issues identified. Avoid broad changes without a clear reason. Examples of focused adjustments include:

- Refining the agenda to prioritize decisions.
- Reducing meeting length to support focus.
- Clarifying which roles attend every meeting versus guest attendees.

- Rotating facilitation to balance participation.
- Separating information sharing from decision making.

Proposed Adjustments	Reason for Adjustment

Step 4: Define how changes will be tested

Treat meeting changes as a short-term test rather than a permanent shift. Define:

- What will change.
- How long the test will run.
- How success will be evaluated.
- How feedback will be gathered.

Examples of success indicators:

- Meetings end with clear decisions or next steps.
- Action items have named owners and timelines.
- Attendance stabilizes or improves.
- Participants report improved clarity or usefulness.
- Less time is spent revisiting prior topics.

Step 5: Communicate changes early

Before implementing changes, communicate with participants so expectations are clear. Communicate:

- What is changing and what is not.
- Why this change is being tested.

- How long the test will last.
- How participants can share feedback.

Step 6: Review and decide

At the end of the test period, review feedback and observations. Decide whether to:

- Continue the new structure.
- Refine the changes and test again.
- Revert one or more elements.

Decisions Made	Rationale

See Continuous improvement guidance

Resources

Resource	Description
CDDP County Directory	Statewide directory of CDDPs
Brokerage Directory	Statewide directory of Brokerages
Zip matrix	Statewide directory for AAA, APD, & SSP Includes OEP-AAA-CDDP-Brokerage Crosswalk
OEP-IM-25-014	ODHS and Type B AAA staff can share information with Office of Developmental Disabilities Services (ODDS) partner agencies like Community

	Developmental Disabilities Programs (CDDPs), Support Service Brokerages, and Children's Intensive In-Home Services (CIIS) to coordinate benefits and services for people experiencing intellectual and/or developmental disabilities (I/DD).
DD-IM-26-007	Office of Developmental Disabilities Services (ODDS) partner agencies like Community Developmental Disabilities Programs (CDDPs), Support Service Brokerages, and Children's Intensive In-Home Services (CIIS) can share information with ODHS and Type B AAA staff to coordinate benefits and services for people experiencing intellectual and/or developmental disabilities (I/DD).